

Enter ←

Xerox SMARTdocument Travel™ 5
Licensing and
Installation Guide



Contents

Web license activation number	3
Products purchased	4
Software download, installation and web license activation instructions	5
Frequently asked questions (FAQ)	17



Web license activation number

Congratulations for making the SMARTdocument Travel choice!

Xerox prides itself on a commitment to quality and a reputation for excellence, and we're confident that your SMARTdocument Travel purchase will help you manage workflows better, faster and easier.

Please visit www.smartdocumenttravel.com where you can find additional information regarding SMARTdocument Travel including training materials and more.

It is important to note SMARTdocument Travel is powered by AutoStore – a comprehensive document capture and workflow solution developed by Notable Solutions, Inc. (NSi). There may be occasion when you see reference to AutoStore or NSi in licensing, copyright or support instructions.

In the following pages are instructions for activating your licenses. If you need any assistance please contact us at: Licensing@nsius.com or 240-683-8400, option 2, and one of our team members will be able to help you.

Thank you for purchasing SMARTdocument Travel powered by AutoStore.

Software purchased by: _____

Account number: _____

INV number: _____

Maintenance contract ID : _____

Legal Notice:

By activating and registering your licenses herein, and based upon the purchased software maintenance option on this purchase order, you will be assigned a *Maintenance Contract ID* and herein accepting: This *Maintenance Contract ID* covers the purchased software items activated during this registration and activation process. This *Maintenance Contract ID* legally provides you with rights to receive software updates and upgrades for items listed under this Purchase Order as described under the terms of the Software Maintenance Agreement.

You are further agreeing that using this license activation and corresponding *Maintenance Contract ID* on a software installation that has other previously activated licenses will activate maintenance on all installed software including previously licensed software. You further agree that You are liable for payment of any additional maintenance fees associated with your registered installation activated using this *Maintenance Contract ID*, related to maintenance coverage provided under this Contractual agreement including but not limited to previously activated software on the same computer.

Software download, installation and web license activation instructions

There are four simple steps to get SMARTdocument Travel properly installed and ready to use:

1. Software Download
2. SMARTdocument Travel Installation
3. Web License Activation
4. Apply Updates

Software download

You can download SMARTdocument Travel 5 by visiting smardocumenttravel.com and selecting Downloads

Note: Prior to installation, check system requirements information below.

Minimum and recommended system requirements

SMARTdocument Travel 5 is a 32-bit application which runs on:

- Windows XP Pro (latest Service Pack)
- Windows Vista (Service Pack 1)
- Windows 2003 Server 32/64 bit
- Windows 2008 Server 32/64 bit

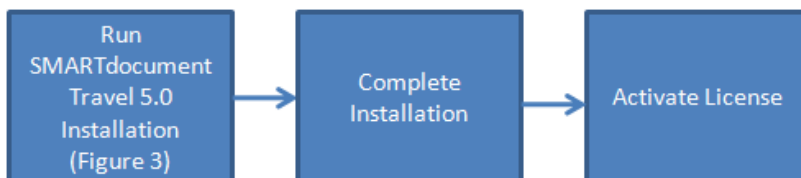
The following chart provides a guideline for minimum hardware requirements as well as recommendations for small, medium and large deployments for SMARTdocument Travel 5:

	Minimum Requirements	Small Deployment Recommendation	Medium Deployment Recommendation	Large Deployment Recommendation
CPU	1 GHz	Single Desktop CPU: 2 GHz or more	XEON or Opteron CPU: 2 MB or more 2 nd level cache 1 or 2 CPUs / cores	XEON or Opteron CPU: 2 MB or more 2 nd level cache Multiple CPUs / cores
RAM	512 MB	1 GB	2 GB to 4 GB	4 GB or more
HDD	5 GB	5 GB	10 GB	50 GB
Network		100 Mbit	100 Mbit / 1 Gbit	1 Gbit
Usage		Small Branch Office	Small to medium branch office or MFP Hub Server	Single Enterprise Server or Processing Slave

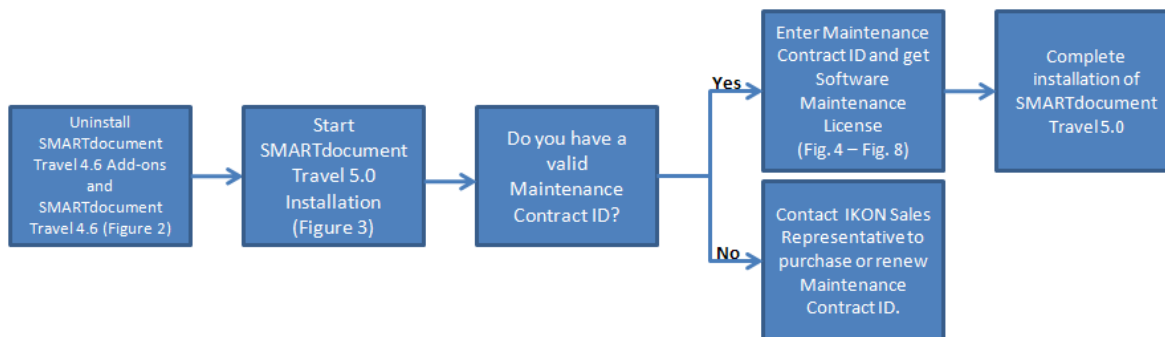
SMARTdocument Travel 5 Installation

There are four different SMARTdocument Travel 5 installation scenarios that may exist. Each scenario requires different steps that must be performed. Follow the steps and corresponding figures described for each situation:

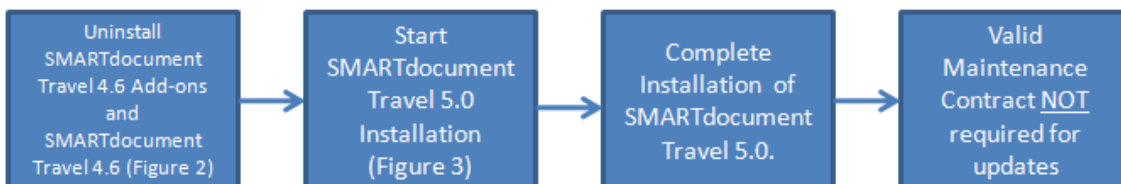
1. Installation of SMARTdocument Travel 5 on a new server



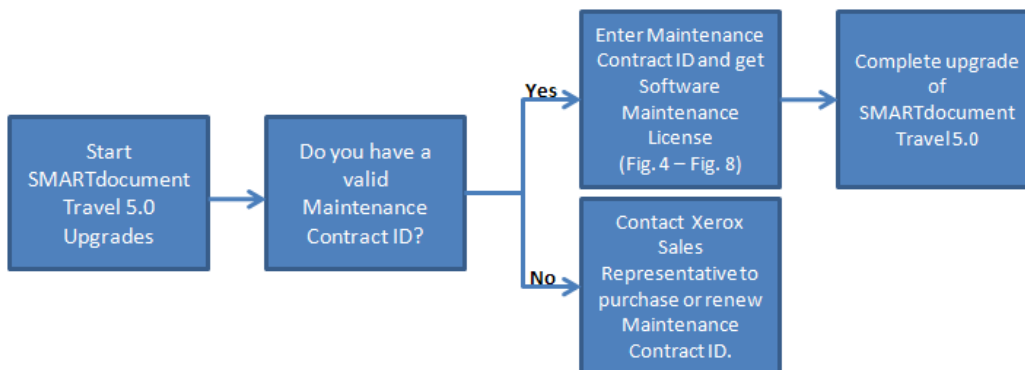
2. Upgrading SMARTdocument Travel 4.6 to SMARTdocument Travel 5 (Original 4.6 installation is “licensed” or the licensed has “expired”).



3. Upgrading SMARTdocument Travel 4.6 to SMARTdocument Travel 5 (Original 4.6 installation is NFR mode and the installation is in “licensed” mode).



4. Applying updates to SMARTdocument Travel 5 (Original 5 installation is “licensed” or the license has “expired”).



Steps and figures for SMARTdocument Travel 5 installation

Upgrading from SMARTdocument Travel 4.6 to SMARTdocument 5

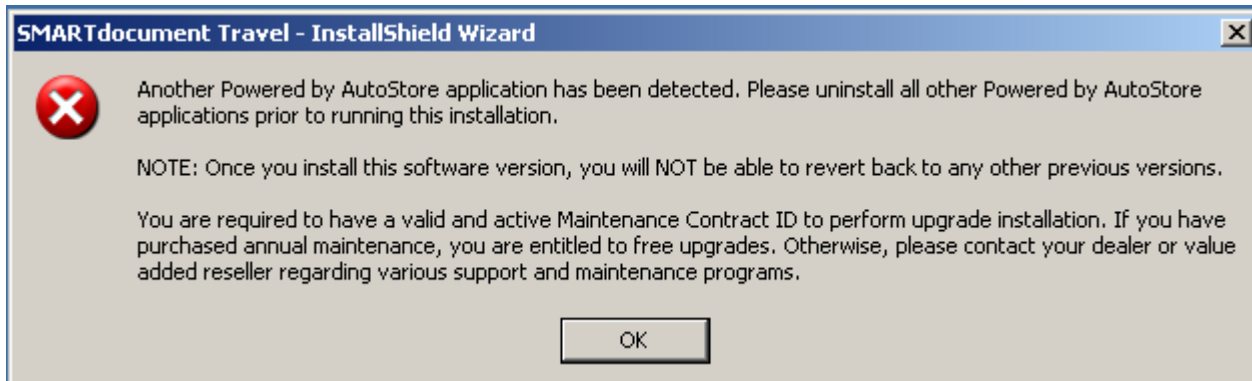


Figure 1: For users upgrading from SMARTdocument Travel 4.6 to SMARTdocument Travel 5, a warning message will be displayed informing them of the following:

1. Uninstall AutoStore-powered applications
2. Install SMARTdocument Travel 5

Important Note: Once SMARTdocument Travel 5 is installed, it is not possible to revert back to any previous version of SMARTdocument Travel.

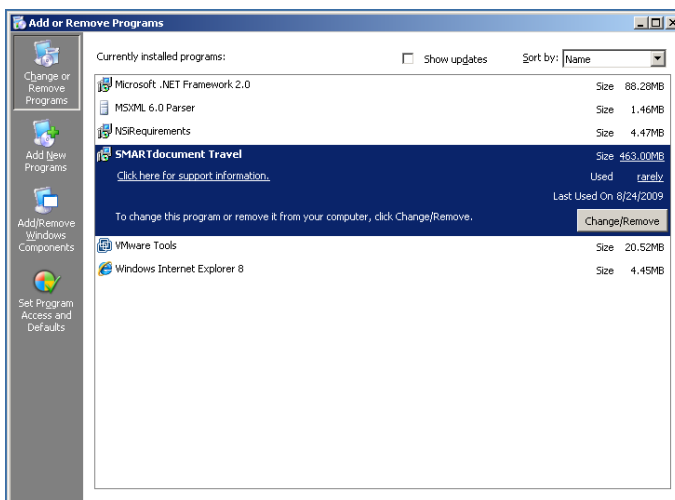


Figure 2: Uninstall all add-ons, then Uninstall SMARTdocument Travel 4.6.

Install SMARTdocument 5

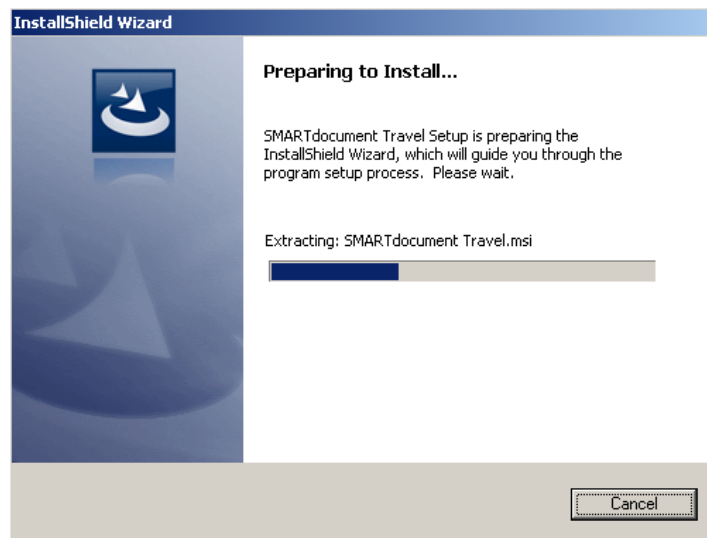


Figure 3: Start Installation of SMARTdocument Travel 5.

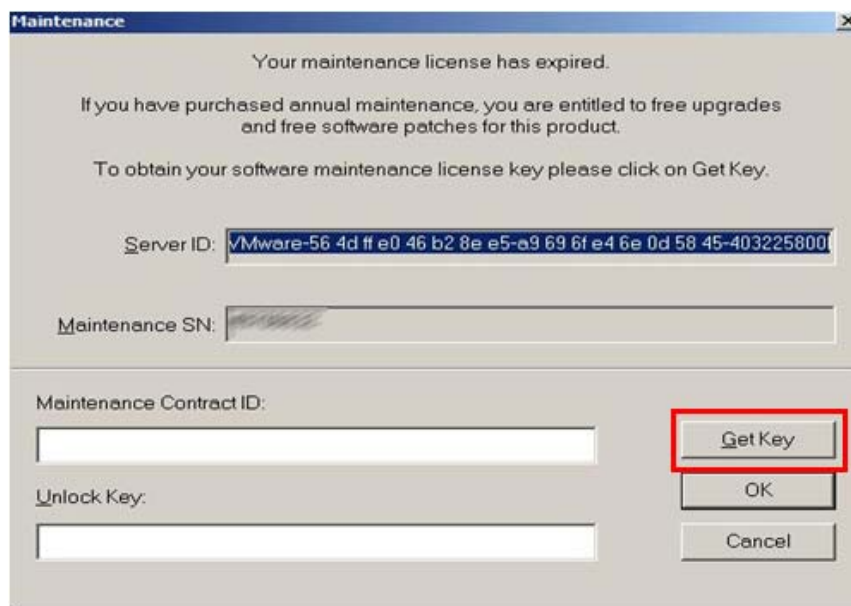
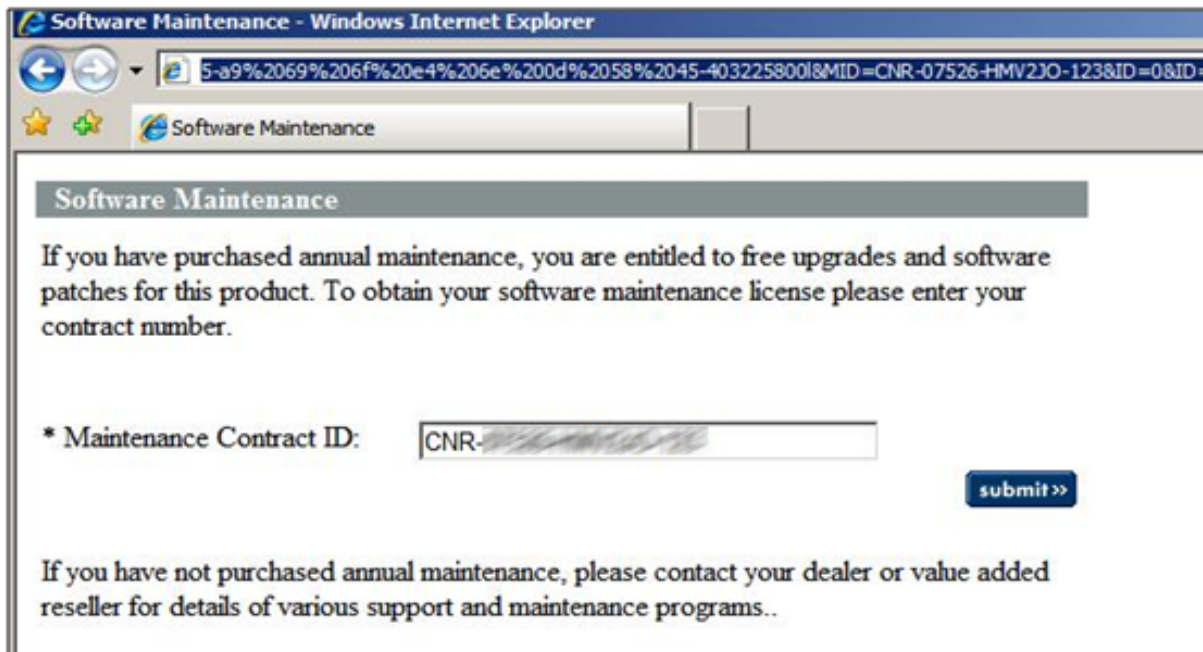


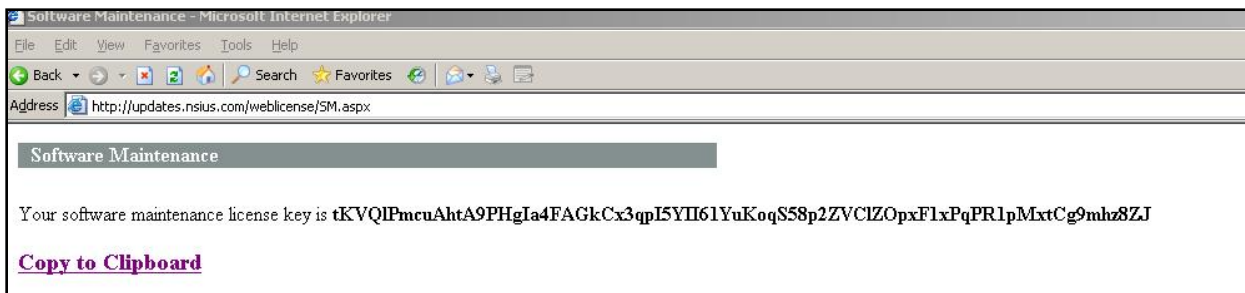
Figure 4: Before you can complete the installation, you need to enter the Maintenance Contract ID as well as Software Maintenance License Key (or Unlock Key).

Obtain Software Maintenance License Key (or Unlock Key) by clicking **Get Key** and enter Maintenance Contract ID.



Figures 5: Enter Maintenance Contract ID, then click submit to obtain your Software Maintenance License Key.

Software Maintenance License Key generation



Figures 6: Software Maintenance License Key is generated for your machine automatically.

Copy the Software Maintenance License Key to Unlock Key field.

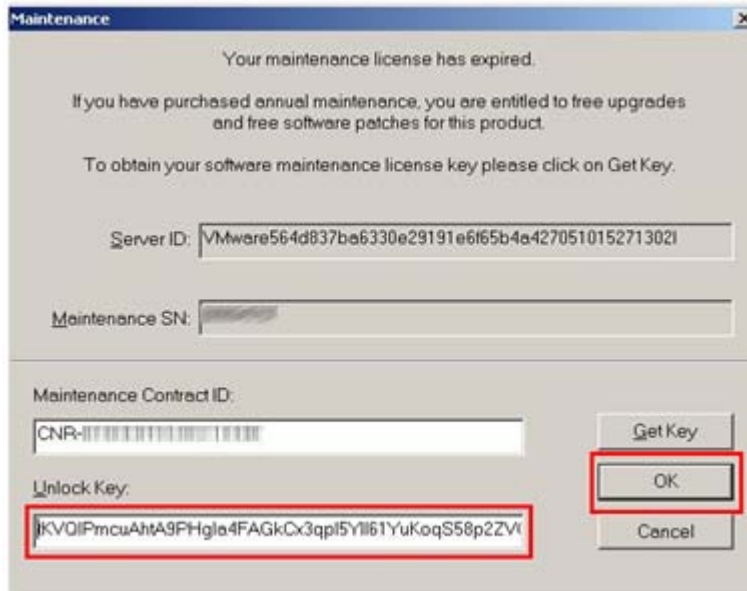


Figure 7: Once you have entered the Maintenance Contract ID and Software Maintenance License Key (Unlock Key), press OK to continue with the installation of SMARTdocument Travel 5.

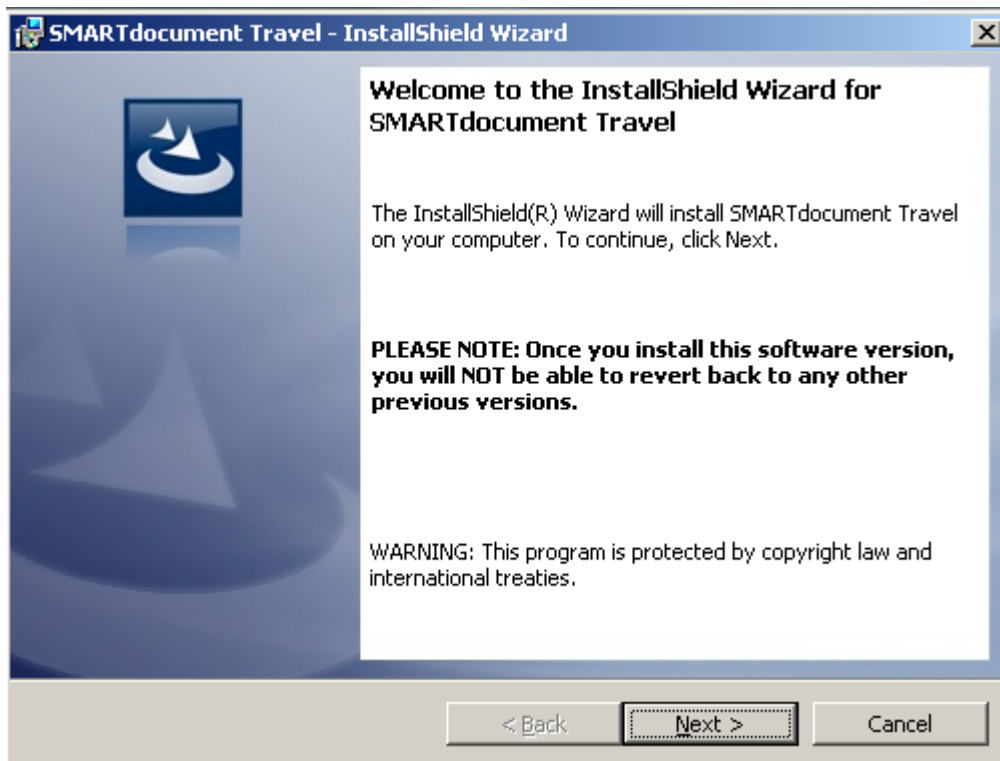
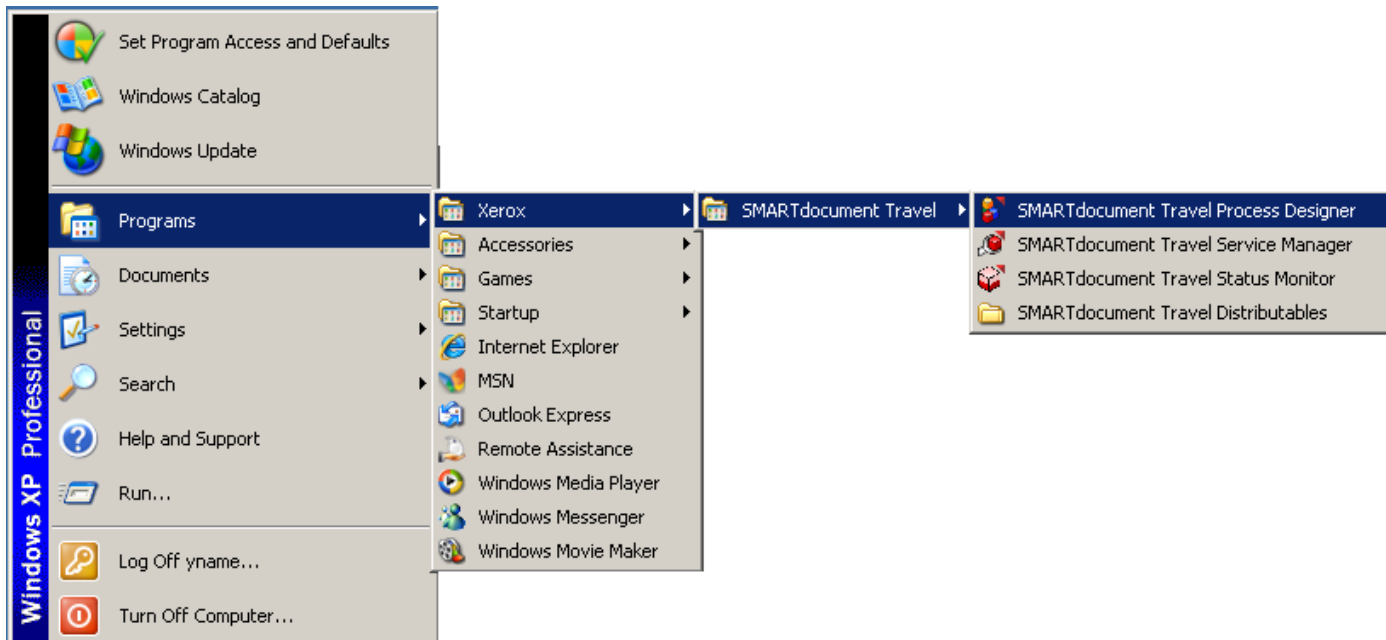


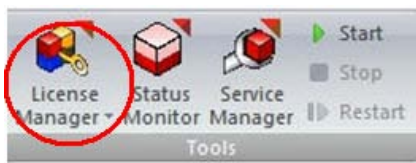
Figure 8: Click Next to continue with installation of SMARTdocument Travel 5.

Web License Activation

1. Select Start > Programs > Xerox > SMARTdocument Travel > SMARTdocument Travel Process Designer



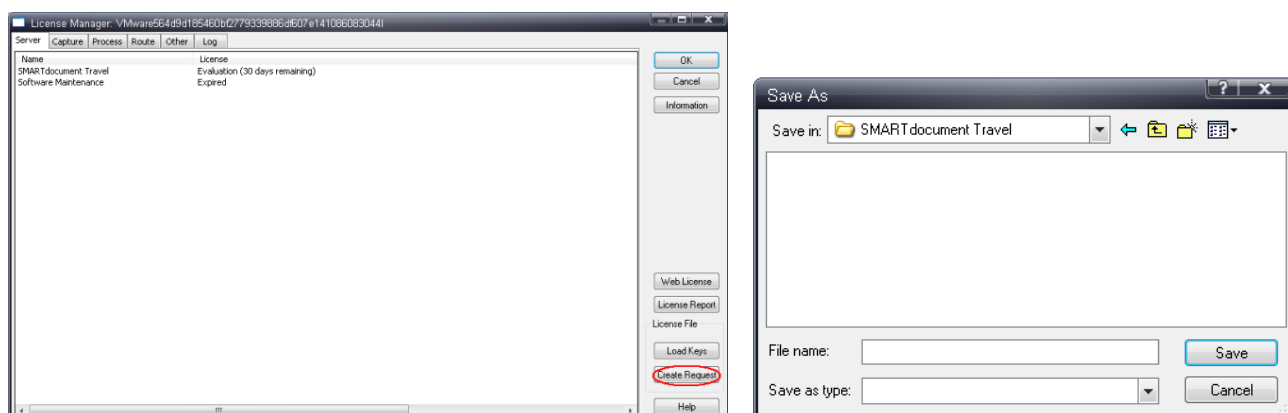
2. Click **License Manager** from the SMARTdocument Process Designer toolbar. Select the **Capture** tab and check to see if the device that is to be licensed is listed in the **License Manager**.



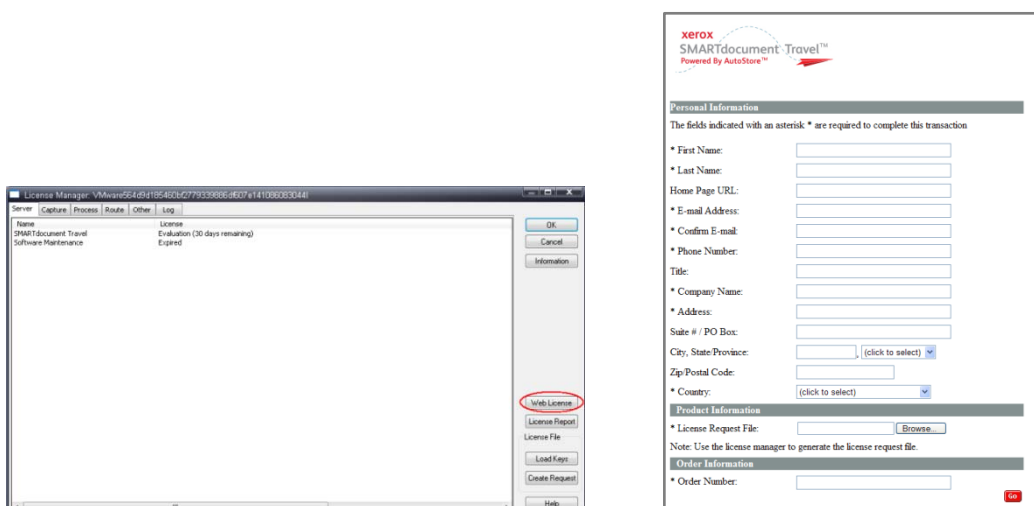
If the capture device you intend to use is not listed in the Capture tab of the License Manager or you would like to install the latest available Service Pack, please refer to Software Updates to install the required add-on software. To do so, click on Software Updates from the SMARTdocument Travel Process Designer toolbar then go to page 16 and follow the instructions. Otherwise proceed to step 3.



3. Click **Create Request** from the Server tab of the **License Manager**. In the “Save As” dialog box create a license request text file. An example would be “License file name.txt”. Remember to write down the path and file name – this information will be needed later.



4. Click **Web License** which is located on the Server tab of License Manager. Enter the requested information into the form fields.



When entering this information, keep in mind that email addresses cannot be from free email services such as Yahoo or Gmail. Also, license information that was saved in step 3 must be entered into the location for the License Request File. The user has the option of browsing for this information. Finally, the Order Number (sometimes referred to as the License Number) that was received from the NSi Sales representative must match the following format: INV-XXXXX-XXXXXX. This information must be entered manually and not cut and pasted. After clicking **submit**, you will receive a list of the available licenses currently included on your order.

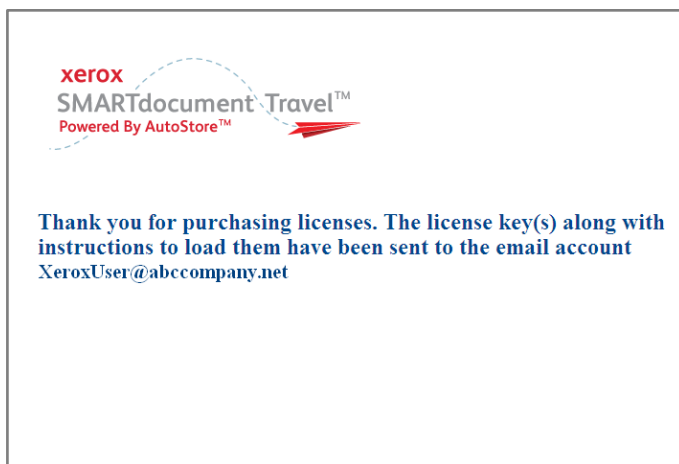
Important Note: Remember that the Order Number must be entered manually and NOT copied and pasted into the Order Number field!

5. Select the number of licenses for each product that you want to license, and click **submit**.



The screenshot shows the Xerox SMARTdocument Travel interface. At the top is the logo: "xerox SMARTdocument Travel™ Powered By AutoStore™". Below the logo is a section titled "Available License(s):". Underneath, it says "Please select the product(s) that you would like to license." There is a list of licenses with a dropdown menu to the right. At the bottom right of the license selection area is a "submit >>" button.

After clicking "Submit," you will see a message asking you to click OK to have the license key(s) delivered to your email account. Click **OK** and the following confirmation message will appear.

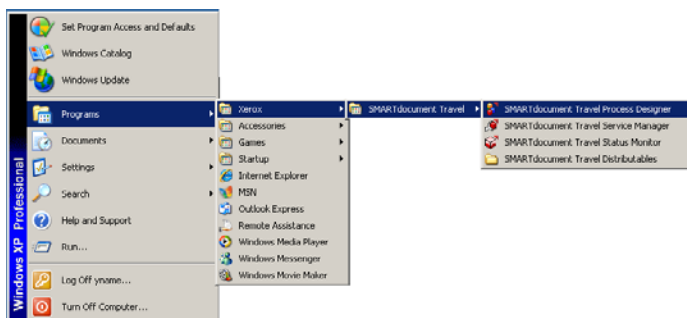


The confirmation message is displayed in a white box with a black border. It features the Xerox SMARTdocument Travel logo at the top. Below the logo, the text reads: "Thank you for purchasing licenses. The license key(s) along with instructions to load them have been sent to the email account XeroxUser@abccompany.net".

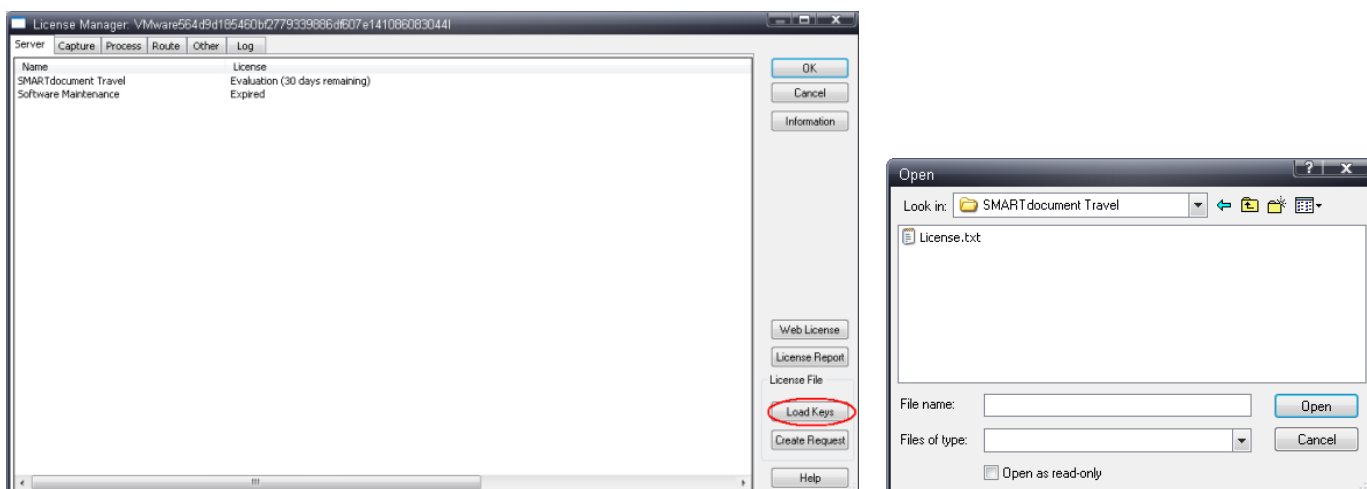
- Go to your email account and open the email from weblicense@nsius.com that is titled “NSI Web License”. Open the email and save the license key file that is attached. Remember to write down the path where the attachment will be saved and the name of the file – this information will be needed later.



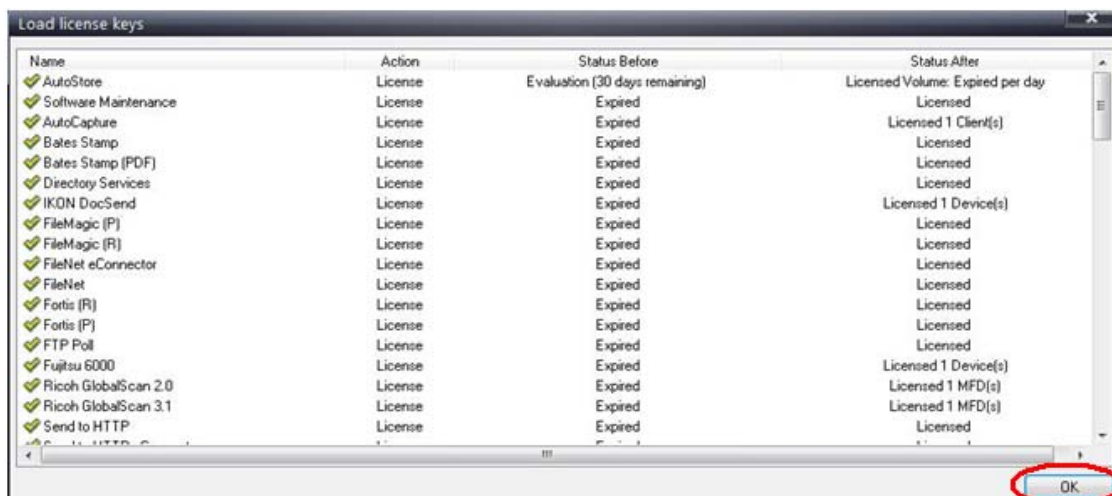
- Select Start > Programs > Xerox > SMARTdocument Travel > SMARTdocument Travel Process Designer. Select License Manager.



8. Select Load Keys and in the license file dialog box and choose the location and the name of the license key file that was emailed as an attachment and saved in step 6. Click Open.



9. A Load license key window will open and display all activated licenses. Click **OK**. The file will load automatically. SMARTdocument Travel 5 is now licensed and ready to use.



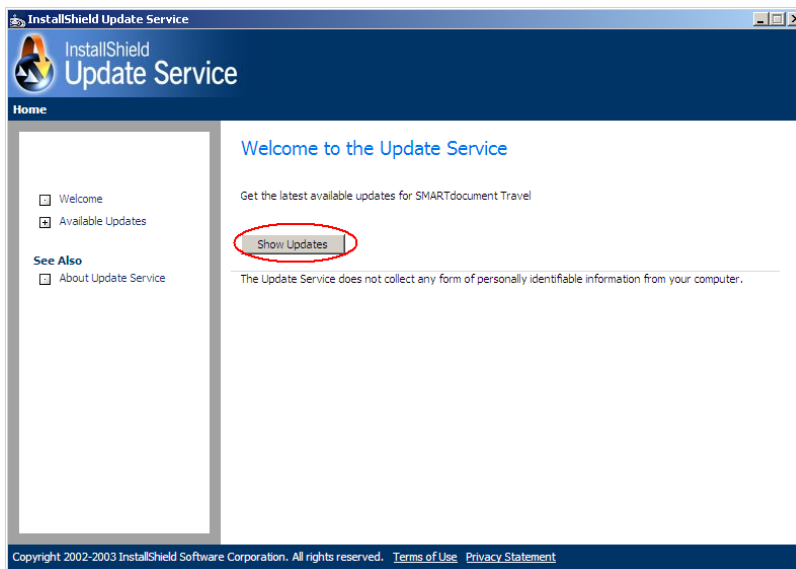
Apply Updates

Software updates are released periodically. To ensure that SMARTdocument Travel 5 is up-to-date with all available Service Packs or to install SMARTdocument Travel add-ons:

1. Select Software Updates from the SMARTdocument Travel Process Designer toolbar.



2. The **Update Service** window will open. Select **Show Updates** and proceed with the remaining steps in the window to install each add-on or Service Pack. Note that some add-ons or Service Packs must be installed separately. As a result, this step may need to be repeated for other add-ons or Service Packs.



Frequently asked questions (FAQ)

1. What is a Maintenance Contract ID?

This is a unique ID which identifies the maintenance contract for a customer's server. It has a start and end date. The Maintenance Contract ID serves as a proof of purchase of maintenance and allows for installation of updates/upgrades. It is sent to customers by e-mail. The ID follows the format "CNR-XXXXX".

2. What is a Software Maintenance License Key?

This is a unique key that is generated for every new SMARTdocument Travel 5 machine.

3. What is a Software Maintenance License?

A license that is displayed within the License Manager window and shows the expiration date of the maintenance contract.

Example:



4. What is a Entitlement Number or INV #?

A unique string used at the time of activation on the Web Licensing form to retrieve the list of licenses a user is entitled to receive.

5. Why do I need a Maintenance Contract ID?

Users need a valid Maintenance Contract ID to install updates/upgrades.

6. What is the difference between a Maintenance Contract ID and a Software Maintenance License?

Users need a valid Maintenance Contract ID to license their Software Maintenance License.

7. I lost my Maintenance Contract ID, or I cannot remember where it is?

Contact your sales representative to get the Maintenance Contract ID, or search your e-mail inbox for a string that start with "CNR".

8. I need to install new updates/upgrades and was prompted to enter a Maintenance Contract ID, but my maintenance has expired.

If you want to install any new updates/ upgrades you must have a valid Maintenance Contract ID. Please contact your sales rep to renew/purchase Maintenance Contract ID.

9. I just downloaded SMARTdocument Travel 5, and have 30 days to evaluate the software, however I need to install new updates/upgrades to complete my evaluation; do I need a Maintenance Contract ID?

During evaluation, you don't need a Maintenance Contract ID to install any updates/upgrades.

10. I am an existing SMARTdocument Travel 4.6 customer, and would like to upgrade to SMARTdocument Travel 5. Do my licenses work with SMARTdocument Travel 5?

Yes, whichever mode (Evaluation, Licensed, Expired, and NFR) you are currently in, it will get carried over to SMARTdocument Travel 5.

